




ONE Minute Brief

20 JANUARY 2021



 Economic and Political News

South Africa's mining and gold production drop more than market forecasts in November.

Deputy President David Mabuza to lead new inter-ministerial committee (IMC) that will facilitate COVID-19 vaccine rollout.

Western Cape premier Alan Winde calls for alcohol ban to be lifted as infections decline.

Health Minister Zweli Mkhize says alcohol ban has helped ease pressure on health workers.

 **South Africa Market** ▼

South African markets closed in the red yesterday, as resources and gold mining stocks declined following weak mining production data.

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JSE All Share (ZAR)		JSE Top 40 (ZAR)		JSE Africa Fin. (ZAR)	
▼ 63,603.26		▼ 58,358.85		▲ 12,017.40	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-110.61	-0.17	-189.32	-0.32	112.94	0.95
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
0.08	7.06	-0.15	7.32	0.84	-0.36
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
4.06	7.06	3.83	7.32	8.08	-0.36

 **US Market** ▲

US markets closed firmer yesterday, as Treasury Secretary nominee Janet Yellen called for additional fiscal spending.

S&P 500 futures 

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S&P 500 (USD)		Nasdaq Composite (USD)		DJIA (USD)	
▲ 3,798.91		▲ 13,197.18		▲ 30,930.52	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
30.66	0.81	198.68	1.53	116.26	0.38
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
0.81	1.14	1.53	2.40	0.38	1.06
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
3.71	1.14	5.65	2.40	3.27	1.06

JSE All Share

S&P 500

 **Top Gainers**

Truworths International Ltd	9.0%	-6.4%
Blue Label Telecoms Ltd	8.4%	-5.2%
Foschini Group Ltd/The	8.2%	-4.4%
Curro Holdings Ltd	7.6%	-3.8%
Steinhoff International Holdings NV	7.6%	-3.7%

Top Losers 

Emira Property Fund Ltd		
Gold Fields Ltd		
Vukile Property Fund Ltd		
Pan African Resources Plc		
African Rainbow Capital Investments Ltd		

 **Top Gainers**

General Motors Co	9.8%	-6.2%
CarMax Inc	9.4%	-5.9%
Etsy Inc	8.3%	-5.1%
Live Nation Entertainment Inc	6.9%	-4.7%
Skyworks Solutions Inc	6.2%	-4.0%

Top Losers 

Xerox Holdings Corp		
National Oilwell Varco Inc		
Welltower Inc		
Fox Corp		
Fox Corp		

 UK Market ▼

UK markets finished lower yesterday, led by losses in mining sector stocks.

FTSE 100 futures 

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FTSE 100 (GBP)		DAX 30 (EUR)		CAC 40 (EUR)	
▼ 6,712.95		▼ 13,815.06		▼ 5,598.61	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-7.70	-0.11	-33.29	-0.24	-18.66	-0.33
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
-0.34	3.91	0.20	0.70	-0.23	0.85
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
3.10	3.91	3.22	0.70	0.60	0.85

 Asia Market ▲

Asian markets are trading mostly higher this morning, tracking overnight gains on Wall Street. The Nikkei 225 Index is trading 0.6% higher at 28,469.73.

*As at 6:00 SAST

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Nikkei 225 * (JPY)		Shanghai Composite * (CNY)		Hang Seng * (HKD)	
▼ 28,469.73		▲ 3,566.67		▲ 29,736.85	
1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg	1 Day Chg	1 D % Chg
-163.73	-0.57	0.29	0.01	94.57	0.32
WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.	WTD % Chg.	MTD % Chg.
0.40	4.33	0.00	2.69	3.74	8.85
Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.	Prev. Month % Chg	YTD % Chg.
3.82	4.33	2.40	2.69	3.38	8.85

FTSE 100

 Top Gainers

Smith & Nephew Plc	3.5%	-11.9%
Hargreaves Lansdown Plc	2.8%	-3.5%
HSBC Holdings Plc	2.1%	-3.0%
Pearson Plc	1.9%	-2.9%
Scottish Mortgage Investment Trust Plc	1.6%	-2.6%

Top Losers 

Entain Plc d		
WPP Plc		
Barclays Plc		
Standard Chartered Plc		
Flutter Entertainment Plc		

Nikkei 225


 Top Gainers


Sumitomo Chemical Co Ltd	7.8%	-3.9%
Tokyo Electric Power Co Holdings Inc	6.5%	-3.7%
Toray Industries Inc	4.3%	-3.2%
Sharp Corp	4.1%	-2.8%
Taiyo Yuden Co Ltd	3.8%	-2.7%

Top Losers 

Daiichi Sankyo Co Ltd		
Z Holdings Corp		
Keio Corp		
Chugai Pharmaceutical Co Ltd		
Odakyu Electric Railway Co Ltd		

 Currencies

USD  **USD/ZAR**


ZAR  **14.9503**


▼ -0.24%

At 06:00 SAST, the US Dollar retreated against the South African Rand.

The US Dollar fell against the South African Rand yesterday, as Janet Yellen urged lawmakers for more coronavirus relief spending.

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GBP  **GBP/ZAR**


ZAR  **20.4073**

▼ -0.15%

At 06:00 SAST, the British Pound is trading weaker against the South African Rand.

The British Pound declined against the South African Rand yesterday.


EUR  **EUR/ZAR**


ZAR  **18.1530**

▼ -0.11%

At 06:00 SAST, the Euro fell against the South African Rand.

The Euro weakened against the South African Rand yesterday.

AUD  **AUD/ZAR**


ZAR  **11.5391**

▲ 0.01%

At 06:00 SAST, the Australian Dollar is trading slightly higher against the South African Rand.

The Australian Dollar dropped against the South African Rand yesterday.

 Commodities

 **▲ 0.72%**


Brent (\$/barrel)

56.30

At 06:00 SAST, Brent crude oil rose.

Yesterday, Brent crude oil climbed, amid expectations for a massive US stimulus spending.

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 **▲ 0.46%**


Gold (\$/oz)

1848.60

At 06:00 SAST, gold prices edged higher, following Janet Yellen's comments on US stimulus.

Yesterday, gold prices rose, amid weakness in the greenback.

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 **▬ 0.00%**

Platinum (\$/oz)

1088.40

At 06:00 SAST, platinum prices advanced.

Yesterday, platinum prices advanced.

 **Copper (\$/MT)***

7951.25

Yesterday, copper prices have risen.

* As of previous close

Major South African Corporate News

Foschini Group Limited

Announced, in its 3Q21 trading update, that turnover rose by 14.7%.

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Major Global Economic News



Asia

Australia's Westpac consumer confidence index declined in January















Eurozone

Germany's consumer prices declined as initially estimated in December.

Eurozone's current account surplus narrowed in November.

German economic sentiment index climbed more-than-expected in January.

 Economic Calendar

Country	SAST	Economic Indicator	Relevance	Consensus/*Actuals	Previous	Frequency
 China	03:30	PBOC Lending Rate (Jan)	★	3.85%*	3.85%	Monthly
 Germany	09:00	Producer Price Index (MoM) (Dec)	★★★	-	0.20%	Monthly
 UK	09:00	Consumer Price Index (MoM) (Dec)	★	0.20%	-0.10%	Monthly
 UK	09:00	Retail Price Index (MoM) (Dec)	★	0.50%	-0.30%	Monthly
 South Africa	10:00	Consumer Price Index (MoM) (Dec)	★★	0.20%	0%	Monthly
 South Africa	10:00	Consumer Price Index (YoY) (Dec)	★★	3.10%	3.20%	Monthly
 Eurozone	12:00	Consumer Price Index (YoY) (Dec) (F)	★★★	-0.30%	-0.30%	Monthly
 Canada	17:00	Bank of Canada Interest Rate Decision	★★★	-	0.25%	As Scheduled
 Canada	17:00	BoC Rate Statement	★★★	-	-	As Scheduled
 US	17:00	NAHB Housing Market Index (Jan)	★	86.00	86.00	Monthly
 UK	19:00	BoE Governor Bailey Speech	★	-	-	As Scheduled
 US	-	Joe Biden's Inauguration	★	-	-	As Scheduled

Note: ★★★ High ★★ Medium ★ Low

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formerly Grant Thornton Capital

a GTC, The Wanderers Office Park,
52 Corlett Drive, Illovo, 2196

p P O Box 55118, Illovo, 2116

t +27 (0) 10 597 6800

f +27 (0) 10 597 6801

w www.gtc.co.za

GTC (Pty) Ltd.

reg. no. 1996/001488/07

directors: G.K. Mockler, F.Dildar

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